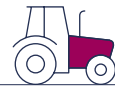


Earlier conditions



Growing season (April-September)



Harvest



Post harvest processing



Winemaking



Wine marketing and distribution

Increased or decreased demand for products and services, depending on business + -

Changes in timing when products and services are needed + -

Challenges meeting customer demands and strains on business relationships -

Customers struggled to afford inputs and services -

Long working hours -

Expanded capacity to provide products and services (e.g. took on temporary workers) *

Prioritised customers at times of high demand *

Increased or decreased prices of products and services or adjusted invoicing structures (e.g. supplying products on credit) *

Favourable weather conditions in 2017 during flower initiation when the buds for 2018 were developing +
A cold start to the year which warmed up quickly producing slightly delayed but even bud-burst +

Absence of spring frosts +
Sunny and dry during flowering and fruit set and warm spring and growing season with good sunlight +
Low disease pressure +
Large amount of fruit on vines +
More visitors at vineyards, supporting cellar door sales +
Concern about sunburn (all vines) and water stress (young vines) -
Adjusted approach to pruning, fruit thinning and canopy management *
Adjusted use of fungicides and pesticides *
Engaged consultants *
Watered young vines *

Increased knowledge exchange with grape growers *
Planning for earlier and longer harvest *

Sunny and dry during ripening period and harvest +
Able to ripen a very big high-quality crop and to ripen more varieties +
Able to harvest earlier and at 'ideal' time for different varieties to balance sugar/acidity + *
Harvest took longer and was more expensive -
Shortage of harvesting, processing and storage equipment, leading to loss of fruit -
Some harvests ran afoul of PDO cropping thresholds -
Invested in additional harvesting, processing and storage equipment *
Used short-term weather forecasting service *
Increased knowledge exchange with winemakers *
Took on new (temporary) workers *

Reduced demand for grapes and reduced grape prices -
Retained grapes to produce wines under their own brand *
Invested in relationship building with customers and in expanding markets *

Lower grape prices +
Additional grapes available for winemaking +
Quantities of grapes exceeding winemaking, processing and storage capacity -
Harder to access outsourced winemaking, processing, packaging and storage services and equipment due to demand -
Long working hours -
Purchased grapes from new, additional or alternative sources *
Invested in additional processing, storage and wine making equipment, including temporary tanks *
Took on new (temporary) workers *
Hired new or additional contract winemakers or winemaking services *
Sold grapes that couldn't be processed due to capacity limitations *

Higher sugar levels in grapes + -
Able to produce more wine and new types of wine +
Able to produce wine of high quality +
Harder to maintain acidity in winemaking and typicity of wines -
Grapes and juice had low nutritional levels -
Winemaking, bottling and packaging materials more expensive due to demand -
Made changes to the types of wine produced (e.g. more still, red or vintage wines) *
Adjusted use of additives (e.g. reduced addition of sugar - chaptalisation - to increase alcohol levels) *
Adjusted winemaking techniques (e.g. skipping malolactic fermentation, reduced ageing in cellar) *
Experimented with new winemaking techniques and styles (e.g. lower-intervention winemaking techniques) *

High quality wine receiving international recognition and increased interest in English and Welsh wines +
More wine in the marketplace, increasing competition -
Kept wine back in reserves, for future years with smaller harvests *
Invested in marketing to expand and diversify customer base and build relationships with new retailers and distributors *
Released wines at different times (e.g. earlier following less time ageing in cellar) *
Emphasised 'unique' qualities of 2018 wine in marketing *
Adjusted prices (e.g. increased prices on premium wines) *

Larger volumes of wine available for sale and distribution +
Additional and different types of wine available for sale and distribution, including from new producers +
Purchased additional or alternative English and Welsh wines + *
Sourced wines from different or additional producers *
Applied new strategies for marketing English and Welsh wines (e.g. running promotions) *

Key

Input & service providers

Grape growers

Winemakers

Retailers and distributors

+ Opportunity

- Challenge

* Adaptation behaviours undertaken



Increased demand for products and services as sector expands +	understand needs, opportunities and challenges *
Changing customer needs + -	Expanded and diversified business and developed new products or services * -
New entrants into sector increasing competition, access to new markets and opportunities for collaboration + -	Adjusted pricing models and restructured processes for managing payments and invoices * -
Invested in building relationships and communicating with customers to	

Fear that growth in sector will exceed demand for English and Welsh wine and push down prices -	Adjustments in vineyard management regimes (e.g. to pruning regimes, canopy management approaches and vine nutrition) *
Increased investment in production encouraged by performance of 2018 (e.g. site expansion and planting new or additional grape varieties) *	Changes to production strategies to support resilience of soils and vines or to create unique marketable qualities (e.g. organic/low-intervention production) *
Expansion and diversification of business (e.g. investment in marketing and expanding customer base) *	New vineyard monitoring regimes *

Increased investment in sector, including new entrants encouraged by 2018 sector performance creating new competition and opportunities for collaboration + - *	Investment in winemaking equipment and facilities, (e.g. to increase processing and storage capacity or allow more activities to be done 'in-house') *
Fear of surplus of wine (market saturation) pushing prices down -	Expansion and diversification of business (e.g. offering new contract winemaking services) *
Adjustment to grape production and sourced strategies (e.g. to create unique marketable qualities, such as organic, low-intervention or vintage wines) *	Investment in marketing and building linkages with retailers and distributors to attract direct sales and expand customer base *
Adjustment to the types of wine being produced and marketed *	Investment in air conditioning for wineries *

More retailers stocking English and Welsh wines - *	English and Welsh wines *
Increased emphasis on English and Welsh wines in business strategy (e.g. stocking additional wines) *	Changes to buying and ordering processes *
Investments in marketing	Investments in relationship building with existing or additional suppliers *

Key

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